

**DOH LMS Business Rules (Draft)**

Name	Identifier	Description	Example	Source	Related Rules	Revision History	Business Process Established?
Create a New Vendor	BR0001	Only the Statewide LMS Administrator access level is granted the ability to create a new vendor. They may do so at any time with no restrictions.	LMS Administrator at DOH, may create a new LMS vendor as required.	LMS Training Workbook	Vendor naming convention	Defined 6/23/2005	Yes
Add an Online Resource	BR0072	Only the Statewide LMS Administrator and Coordinator/Instructor access levels are granted the ability to add an online resource. They may do so at any time within the defined categories.		LMS Training Workbook	SmartPH Online Resource Naming Convention	Defined 6/23/2005; Revised 6/27/2005	Yes
Add an Online Resource Category	BR0002	Only the Statewide LMS Administrator access level is granted the ability to add an online resource category. They may do so at any time with no restrictions.		LMS Training Workbook	SmartPH Guideline; SmartPH Online Resource Category Naming Convention	Defined 6/23/2005	Yes
Edit an Online Resource Category	BR0073	Only the Statewide LMS Administrator access level is granted the ability to edit an online resource category. They may do so at any time with no restrictions. Coordinator/instructor access level has limited ability to edit an online resource per the SmartPH guidelines.		LMS Training Workbook	BR0002 – Add an online resource category; BR0072 Add an online resource; SmartPH Guideline	Defined 6/23/2005; Revised 6/27/2005	Yes

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Create a Course Category	BR0074	Only the Statewide LMS Administrator access level is granted the ability to create a course category. They may do so at any time with no restrictions. Coordinator/instructor access level has limited ability to create a course category per the SmartPH guidelines.		LMS Training Workbook	SmartPH Guideline; SmartPH Course Naming Convention	Defined 6/23/2005; Revised 6/27/2005	Yes
Create a Library Access Code (LAC)	BR0025	Only the Statewide LMS Adminstrator and Coordinator/Instructor access levels are granted the ability to create a LAC. They may do so at any time within naming convention guidelines.		LMS Training Workbook	SmartPH Guideline; SmartPH LAC Naming Convention	Defined 6/23/2005; Revised 6/27/2005	Yes
Assign OLT Courses to Library Access Codes (LAC)	BR0026	Only the Statewide LMS Adminstrator and Coordinator/Instructor access levels are granted the ability to assign OLT courses to LACs. They may do so at any time without restrictions.		LMS Training Workbook		Defined 6/23/2005	Yes

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Assign ILT Courses to Library Access Codes (LAC)	BR0026	Only the Statewide LMS Adminstrator and Coordinator/Instructor access levels are granted the ability to assign ILT courses to LACs. They may do so at any time without restrictions.		LMS Training Workbook		Defined 6/23/2005	Yes
Assign Users to a Library Access Code (LAC)	BR0027	Only the Statewide LMS Adminstrator and Coordinator/Instructor access levels are granted the ability to assign users to LACs. They may do so at any time without restrictions.		LMS Training Workbook		Defined 6/23/2005	Yes

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Act on Approval Request	BR0075	Only the Statewide LMS Administrator access level is granted the ability to review, approve or deny Learner course enrollments for all Learners in the system. The Coordinator/Instructor access level is granted the ability to review, approve or deny Learner course enrollments for all Learner course enrollments within their region, and Supervisor/Manager access level is granted the ability to review, approve or deny Learner course enrollments for their assigned learners. All levels may take action at any time without restrictions. Only the Supervisor/Manager will receive email notification of the request.		LMS Training Workbook; SmartPH Guidelines		Defined 6/23/2005	Yes

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Create a Test and Survey Repository	BR0076	Only the Statewide LMS Administrator and Coordinator/Instructor access levels are granted the ability to create a test and survey repository. They may do so at any time utilizing SmartPH Test and Survey Respository naming conventions.		LMS Training Workbook; SmartPH Guidelines; SmartPH Test and Survey Repository Naming Conventions	BR0028 – Create a Test or Survey in the Repository; BR0029 – Assign a Test or Survey to a Course	Defined 6/23/2005; Revised 6/27/2005	Yes
Create a Test or Survey in the Repository	BR0028	Only the Statewide LMS Administrator and Coordinator/Instructor access levels are granted the ability to create a test or survey in the repository. They may do so at any time without restrictions.		LMS Training Workbook	BR0076 - Create a Test and Survey Repository; BR0029 – Assign a Survey and Test to a Course	Defined 6/23/2005; Revised 6/27/2005	Yes
Assign a Survey and Test to a Course	BR0029	Only the Statewide LMS Administrator and Coordinator/Instructor access levels are granted the ability to assign a test or survey to a course. They may do so at any time without restrictions.		LMS Training Workbook	BR0076 – Create a Test and Survey Repository; BR0028 – Create a Test and Survey in the Repository	Defined 6/23/2005	Yes

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Assign a Prerequisite to a Course	BR0030	Only the Statewide LMS Adminstrator and Coordinator/Instructor access levels are granted the ability to assign a prerequisite to a course. They may do so at any time without restrictions.		LMS Training Workbook		Defined 6/23/2005	Yes
Adding a Delivery Method	BR0014	Although the Coordintaotor/Instructor access level has the ability to add a delivery method, per SmartPH Guidelines only the Statewide LMS Adminstrator access level is granted the authority to add a delivery method. They may do so at any time without restrictions.		LMS Training Workbook; SmartPH Guideline		Defined 6/23/2005; Revised 6/27/2005	Yes
Add a Drop Reason	BR0012	Only the Statewide LMS Adminstrator and Coordinator/Instructor access levels are granted the ability add a drop reason. They may may do so at any time utilizing the drop reason naming conventions.		LMS Training Workbook; Drop Reason Naming Conventions		Defined 6/23/2005	Yes

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Add a Course	BR0004	Although the Coordinator/Instructor has the ability to add a course, per SmartPH Guidelines only the Statewide LMS Adminstrator access level is granted the authority to add a course. They may do so at any time utilizing the course naming convention.		LMS Training Workbook; SmartPH Guideline; SmartPH Course Naming Convention		Defined 6/23/2005; Revised 6/27/2005	Yes
Add a location	BR0009	Only the Statewide LMS Adminstrator and Coordinator/Instructor access levels are granted the ability add a location. They may do so at any time following the SmartPH guidelines for adding a location.		LMS Training Workbook; SmartPH Guidelines		Defined 6/23/2005	Yes
Add a Classroom	BR0006	Only the Statewide LMS Adminstrator and Coordinator/Instructor access levels are granted the ability add a classroom. They may do so at any time following the SmartPH guidelines for adding a classroom.		LMS Training Workbook; SmartPH Guidelines		Defined 6/23/2005	Yes
My Courses and Catalog Features	BR0077	Only available to Learners and Supervisor/Managers.		LMS Training Workbook		Defined 6/23/2005	Yes

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Create a New Learner	BR0017	Although the Coordinataotor/Instructor access level has the ability to create a new learner, per SmartPH Guidelines only the Statewide LMS Adminstrator access level is granted the authority to create a new learner. They may do so at any time without restrictions.		Statewide LMS Administrator Manual; SmartPH Guideline		Defined 6/23/2005; Revised 6/27/2005	Yes
Edit a Coordinator/Instructor	BR0078	Only the Statewide LMS Administrator access level is granted the ability to edit a Coordinator/Instructor. They may do so at any time with no restrictions.				Defined 6/23/2005	Yes
Add Equipment	BR0011	Only the Statewide LMS Administrator and Coordinator/Instructor access levels are granted the ability to add equipment. They may do so at any time within the naming conventions.		SmartPH Equipment Naming Convention		Defined 6/23/2005; Revised 6/27/2005	Yes



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Add a Class and Assign Resources	BR0035	Only the Statewide LMS Administrator and Coordinator/Instructor access levels are granted the ability to add a class and assign resources. They may do so at any time within the naming conventions.		SmartPH Class Naming Convention		Defined 6/23/2005; Revised 6/27/2005	Yes
Create a Page and Add Content	BR0079	Only the Statewide LMS Administrator and the Coordinator/Instructor access levels are granted the ability to manage online courses including creating pages and adding the content to courses. They may do so at any time with no restrictions.				Defined 6/23/2005	Yes
Create a Course	BR0078	Although the Coordinatator/Instructor access level has the ability to create a course, per SmartPH Guidelines only the Statewide LMS Adminstrator access level is granted the authority to create a course. They may do so at any time following the course naming conventions.		SmartPH Course Naming Convention; SmartPH Guideline		Defined 6/23/2005; Revised 6/27/2005	Yes

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Create a Course w/Authoring Tool	BR0078	Only the Statewide LMS Administrator and the Coordinator/Instructor access levels are granted the ability to manage online courses including creating courses. They may do so at any time following the SmartPH Authoring Tool Usage Guidelines. Courses created with the Authoring Tool must be assigned a test and it must be taken before the course is marked completed in the All Courses page.		SmartPH Guideline		Defined 6/23/2005; Revised 6/27/2005	Yes
Course Certification	BR0079	Only the Statewide LMS Administrator access level is granted the ability to specify course certification details for all courses. The Coordinator/Instructor access level is granted the ability to specify course certification details for courses associated with their region.		LMS Training Workbook		Defined 6/23/2005	Yes

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Register Learners for a Class	BR0036	Only the Statewide LMS Administrator access level is granted the ability to register any learner for a class. The Coordinator/Instructor access level is granted the ability to register learners for a class that is associated with their region.		SmartPH Guideline		Defined 6/23/2005	Yes
Mark Attendance	BR0037	Only the Statewide LMS Administrator access level is granted the ability to mark attendance for any class. The Coordinator/Instructor access level is granted the ability to mark attendance for learners associated with their region.		LMS Training Workbook; SmartPH Guideline		Defined 6/23/2005	Yes
Send a Training Announcement	BR0039	Only the Statewide LMS Administrator access level is granted the ability to send a training announcement for any class. The Coordinator/Instructor access level is granted the ability to send training announcements for classes associated with their region.		LMS Training Workbook; SmartPH Guideline		Defined 6/23/2005	Yes

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Update Status	BR0080	Only the Statewide LMS Administrator access level is granted the ability to update the status of any learner. The Coordinator/Instructor access level is granted the ability to update the status of learners associated with their region.		LMS Training Workbook; SmartPH Guideline		Defined 6/23/2005	Yes
Update Progress	BR0081	Only the Statewide LMS Administrator access level is granted the ability to update the progress of all learners. The Coordinator/Instructor access level is granted the ability to update the progress of learners associated with their region and the Supervisor/Manager access level is granted the ability to update learning plans for their assigned learners. They may do so at any time with no restrictions.		LMS Training Workbook; SmartPH Guideline		Defined 6/23/2005	Yes

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Name	Identifier	Description	Example	Source	Related Rules	Revision History	Business Process Established?
Instructor Schedule Utility	BR0082	The Statewide LMS Administrator access level is granted access to all views of the instructor schedule. The Coordinator/Instructor access level is granted access to view only the classes they are assigned.		LMS Training Workbook		Defined 6/23/2005	Yes
Fee Utility	BR0083	Only the Statewide LMS Administrator and Coordinator/Instructor access levels are granted access to manage the fee utility and may do so at any time with no restrictions.		LMS Training Workbook		Defined 6/23/2005	Yes
ILT Calendar	BR0040	The Statewide LMS Administrator and the Coordinator/Instructor access levels are granted the ability to view the details of the class and the training announcement as well as post events in addition to the ILT and may do so at any time with no restrictions. The learner access level is restricted to the class and register detail view.		LMS Training Workbook		Defined 6/23/2005	Yes

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Name	Identifier	Description	Example	Source	Related Rules	Revision History	Business Process Established?
Create a Learning Plan Template	BR0041	Only the Statewide LMS Administrator and Coordinator/Instructor access levels are granted the ability to create a learning plan template. They may do so at any time with no restrictions.				Defined 6/23/2005; Revised 6/27/2005	Yes
Assign Curricula to a Learning Plan Tempalte	BR0042	Only the Statewide LMS Administrator and Coordinator/Instructor access levels are granted the ability to assign curricula to a learning plan template. They may do so at any time with no restrictions.				Defined 6/23/2005; Revised 6/27/2005	Yes
Assign User Defined Tasks to a Learning Plan Template	BR0044	Only the Statewide LMS Administrator and Coordinator/Instructor access levels are granted the ability to assign user defined tasks to a learning plan template. They may do so at any time with no restrictions.				Defined 6/23/2005; Revised 6/27/2005	Yes

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Name	Identifier	Description	Example	Source	Related Rules	Revision History	Business Process Established?
Assign learners to a Learning Plan Template	BR0043	Only the Statewide LMS Administrator and Coordinator/Instructor access levels are granted the ability to assign learners to a learning plan template. They may do so at any time with no restrictions.				Defined 6/23/2005; Revised 6/27/2005	Yes
Mark a User Defined Task as Complete	BR0044	Only the Statewide LMS Administrator and Coordinator/Instructor access levels are granted the ability to mark a user defined task as complete for any user. The Supervisor/Manager access level is granted the ability to mark a user defined task as complete for their assigned users. They may do so at any time with no restrictions.				Defined 6/23/2005; Revised 6/27/2005	Yes

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Name	Identifier	Description	Example	Source	Related Rules	Revision History	Business Process Established?
Update a Learner's Learning Plan	BR0046	Only the Statewide LMS Administrator and Coordinator/Instructor access levels are granted the ability to update any learner's learning plan. The Supervisor/Manager access level is granted the ability to update learning plans for their assigned learners. They may do so at any time with no restrictions.				Defined 6/23/2005; Revised 6/27/2005	Yes
Create a User Group	BR0010	Although the Coordinator/Instructor access level has the ability to create a new learner, per SmartPH Guidelines only the Statewide LMS Administrator access level is granted the authority to create a user group. They may do so at any time without restrictions.		Statewide LMS Administrator Manual		Defined 6/23/2005; Revised 6/27/2005	Yes



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Name	Identifier	Description	Example	Source	Related Rules	Revision History	Business Process Established?
Edit User Profile	BR0054	The Statewide LMS Administrator access level is granted the ability to edit all user profiles. The Coordinator/Instructor access level is granted the ability to edit user profiles associated with their region. The Supervisor/Manager access level is granted the ability to edit the profiles of their assigned users. The learner access level is granted the ability to edit all of their profile with the exception of their supervisor and status. They may do so at any time with no restrictions.		SmartPH Guideline		Defined 6/23/2005; Revised 6/27/2005	Yes
View a User's Activity Log	BR0085	Only the Statewide LMS Administrator and Coordinator/Instructor access levels are granted the ability to view all user/learner activity logs. The Supervisor/Manager access level is granted the ability to view their learner's activity logs. They may do so at any time with no restrictions.				Defined 6/23/2005; Revised 6/27/2005	Yes

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Edit a Learner's Transcript	BR0059	Only the Statewide LMS Administrator access level is granted the ability to edit any learner transcript. The Coordinator/Instructor access level is granted the ability to edit the transcripts of learners associated with their region, and the Supervisor/Manager access level is granted the ability to edit their assigned learner's transcripts. They may do so at any time with no restrictions.		SmartPH Guideline		Defined 6/23/2005	Yes
Waivers	BR0086	Only the Statewide LMS Administrator access level is granted the ability to allow waivers. They may do so at any time with no restrictions.		LMS Training Workbook		Defined 6/23/2005	Yes
Edit Bulletin Board Name	BR0088	Only the Statewide LMS Administrator access level is granted the ability to edit a bulletin board name and can do so at any time with no restrictions.		LMS Training Workbook; Bulletin Board Naming Convention		Defined 6/23/2005; Revised 6/27/2005	Yes

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Bulletin Board Forum	BR0089	Only the Statewide LMS Administrator access level is granted the ability to create, edit, and delete a bulletin board forum and can do so at any time with no restrictions.		LMS Training Workbook; Bulletin Board Forum Naming Convention		Defined 6/23/2005; Revised 6/27/2005	Yes
Bulletin Board Topics	BR0063	Topics can be created by all user levels. Only the Statewide LMS Administrator access level is granted the ability to lock a topic and can do so at any time with no restrictions.		LMS Training Workbook		Defined 6/23/2005	Yes
Bulletin Board Posting	BR0091	Postings can be created by all user levels per SmartPH guidelines. Only the Statewide LMS Administrator access level has been granted the ability to edit and delete the postings.		LMS Training Workbook; SmartPH Guideline		Defined 6/23/2005; Revised 6/27/2005	Yes
System Reports	BR0090	Only the Statwide LMS Administrator, Coordinator/Instructor, and Supevisor/Manager access levels have been granted the ability to view the system reports and can do so at any time without restriction.		LMS Training Workbook		Defined 6/23/2005	Yes

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Name	Identifier	Description	Example	Source	Related Rules	Revision History	Business Process Established?
Dynamic Reporting Engine (DRE)	BR0092	Only the Statewide LMS Administrator access level has been granted the ability to create custom reports and can do so at any time without restriction. The Administrator also has the ability to share the custom reports with Instructors/Coordinators, and Supervisor/Managers via the All Reports section.		LMS Training Workbook; SmartPH Confidentiality Agreement		Defined 6/23/2005; Revised 6/27/2005	Yes
Adding a Coordinator/Instructor	BR0008	Only the Statewide LMS Administrator access level is granted the ability to add a coordinator/instructor and can do so at any time within the naming convention.		Statewide LMS Administrator Manual; Coordinator/Instructor Naming Convention		Defined 6/23/2005; Revised 6/27/2005	Yes
Adding/Editing Course Categories	BR0093	Although the Coordintaotor/Instructor access level has the ability to add/edit course categories, per SmartPH Guidelines only the Statewide LMS Adminstrator access level is granted the authority to add/edit course categories. They may do so at any time following the course category naming conventions.		Statewide LMS Administrator Manual; Course Category Naming Convention; SmartPH Guideline		Defined 6/23/2005; Revised 6/27/2005	Yes

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Setting Due Dates to a Learning Plan	BR0045	Only the Statewide LMS Administrator and Coordinator/Instructor access levels are granted the ability to set due dates to a learning plan for all learners. The Supervisor/Manager access level can set due dates to a laerning plan for assigned users only. All access levels can do so at any time without restrictions.		Statewide LMS Administrator Manual		Defined 6/23/2005; Revised 6/27/2005	Yes
Product Library User Permissions	BR0094	The Statewide LMS Administrator is considered the Master Librarian. Only the Statewide LMS Administrator/Master Librarian can appoint other Master Librarians and Librarians		Statewide LMS Administrator Manual		Defined 6/23/2005	Yes
Library Set Up and Information Maintenance	BR0095	level is granted the ability to set up libraries and maintain the information contained in those libraries. The Librarian access level is restricted to this function within their local library.		Statewide LMS Administrator Manual		Defined 6/23/2005	Yes

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Name	Identifier	Description	Example	Source	Related Rules	Revision History	Business Process Established?
Add Products and Product Codes to Libraries	BR0096	The Master Librarian access level is granted the ability to add products to libraries. The Librarian access level is restricted to this function within their local library using product code naming convention.		Statewide LMS Administrator Manual; Product Code Naming Convention		Defined 6/23/2005; Revised 6/27/2005	Yes
Add and Maintain Library Categories and Sub Categories	BR0097	The Master Librarian access level is granted the ability to add and maintain library categories and sub categories.		Statewide LMS Administrator Manual		Defined 6/23/2005	Yes
Adding a Supervisor/Manager	BR0098	Although the Coordinatator/Instructor access level has the ability to add a Supervisor/Manager, per SmartPH Guidelines only the Statewide LMS Administrator access level is granted the authority to add a Supervisor/Manager. They may do so at any time without restriction.		Statewide LMS Administrator Manual; SmartPH Guideline		Defined 6/23/2005; Revised 6/27/2005	Yes
Terms of Use	BR0099					Defined 6/23/2005	No
Confidentiality Agreements	BR0100					Defined 6/23/2005	No
Request Use of iLinc	BR0101			SmartPH Guideline		Defined 6/23/2005	Yes

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Periodic Review of Process and Rules i.e., access levels	BR0102	The State LMS Project Team will review LMS Business Processes and Rules on a scheduled basis to verify their effectiveness.		SmartPH Guideline		Defined 6/27/2005	No
Periodic Collection and Review of Customer Feedback	BR0103	The State LMS Project Team will complete a periodic collection and review of customer feedback to identify potential areas for improvement.		SmartPH Guideline		Defined 6/27/2005	No
Communication with Coordinator/Instructors	BR01014	Per SmartPH Guidelines the communication with coordinator/instructors shall occur at regular intervals.		SmartPH Guideline		Defined 6/28/2005	No